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Global Impact Investing Overview Q2 2022

Teaser

May 2022



www.deep-knowledge.org

Global Impact Investing Overview Q2 2022

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Introduction

Developed by Deep Knowledge Philanthropy, the '**Global Impact Investing Overview Q2 2022**' report contains a comprehensive overview of the Global Impact Investing Industry by subsector and the industry as a whole. The report focuses on participants in the industry, the main trends and obstacles, and the development of the industry during the COVID-19 era.

The report covers the industry landscape, defining key focus areas and solutions that actively contribute to improving people's lives and the health of the environment.

Advanced technologies (Artificial Intelligence, Robotics, Advanced Materials, FinTech, and others) **help to drive the emergence of tech in the social sector** and open up new market opportunities. Thus, start-ups play a crucial role in solving complex questions of the modern world.

The report provides a detailed, systematic description of the **leading companies, ambitious start-ups, and impactful investors and charities** associated with the Impact Investing Industry.

Methodology and Approach

Methodology

The report analyzes 220 start-ups, 445 companies, 834 investors, and 100 of the most influential nonprofit organisations.

Start-ups were categorised into 15 specific industry subsectors optimised from the UN Sustainable Goals. All the start-ups are fully focused on impact activity. Sector companies consist of the corporations that intentionally invest to generate social and environmental impact alongside profits.

The data on the main trends in the 'Global Impact Investing Overview Q2 2022' report has been aggregated from a variety of reputable and public data sources, including general and industry-specific databases, media and news reports, and conferences and government websites. While the information presented here is believed to be reliable, the authors make no representation as to the accuracy or completeness of its constituent materials, information, and data.

Approach

Relying on various research methods and analytics techniques, the analytical report provides a comprehensive overview of the Global Impact Investing Industry. This approach has certain limitations, especially when using publicly available data sources and conducting secondary research. Deep Knowledge Philanthropy is not responsible for the quality of the secondary data presented herein; however, we do our best to eliminate risks by using different analytics techniques and cross-checking data.

Data Sources

Media
Overview

Industry
Specialised
Databases

Publicly
Available
Sources

Industry
Reports and
Reviews

Applied Research and Analytics Methods

Descriptive
Analysis

Mixed Data
Research

SWOT
Analysis

Comparative
Analysis

Qualitative Data
Collection

Data
Filtering

Global Impact Investment Factsheet

\$299.9B

Impact investing market size in 2021

17.6%

CAGR expected over the years 2021-2027

~30%

Of the global market is Impact Investing market in the USA

42.4%

Growth of the impact investing market size during the pandemic

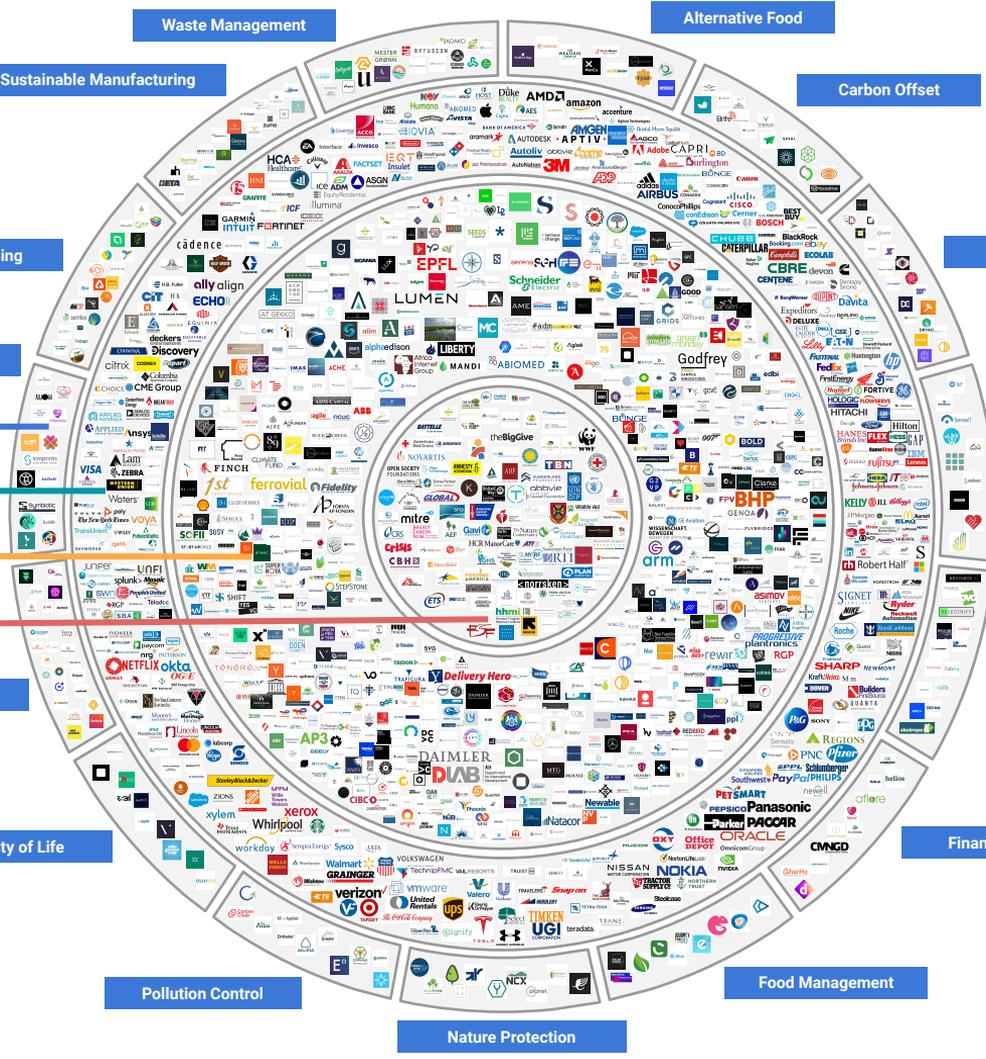
Global Impact Investing Overview Q2 2022: Main Parameters



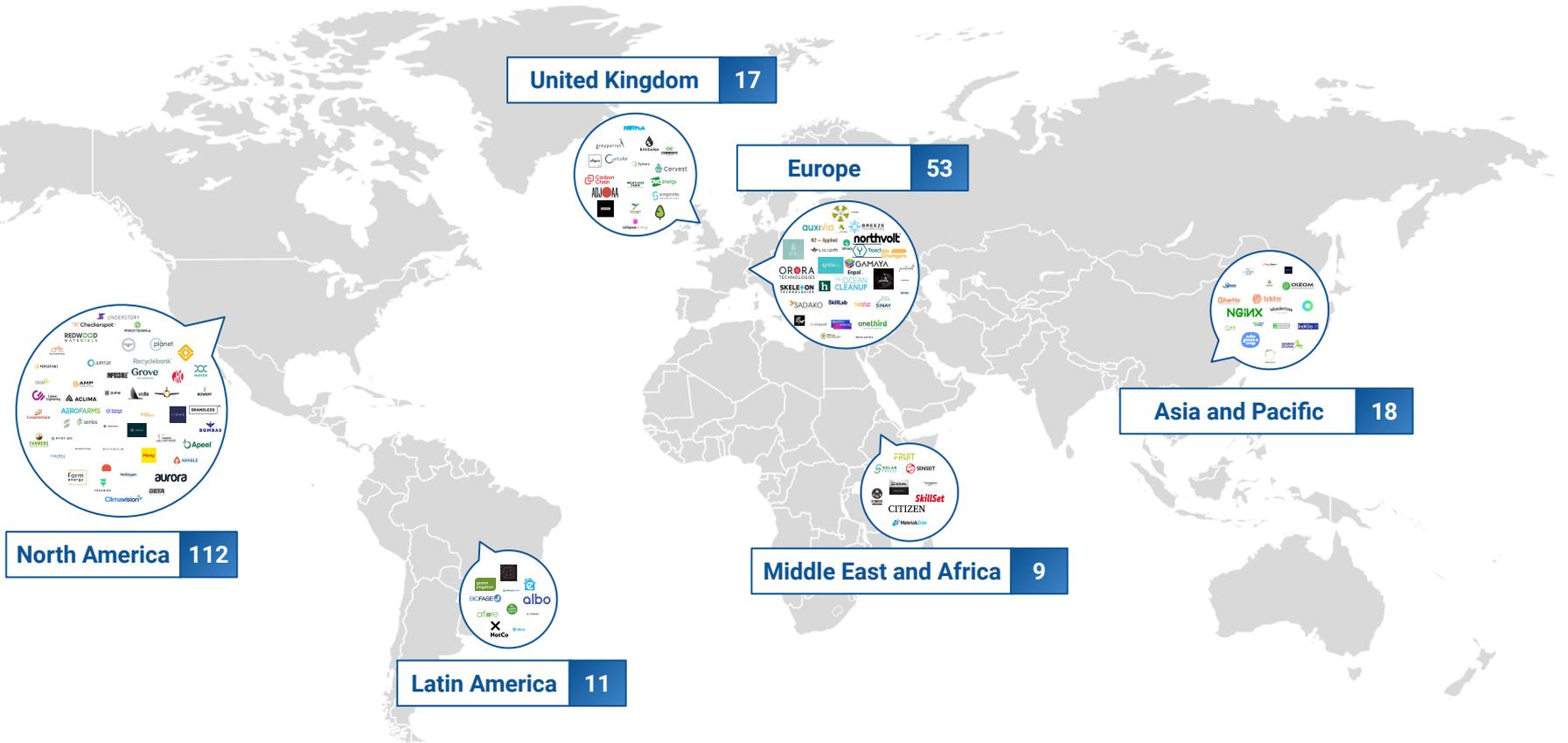
Global Impact Investing Overview Q2 2022

Companies – 445
 Start-Ups – 220
 Investors – 834
 Nonprofit Organisations – 100

- Start-Ups
- Companies
- Investors
- Nonprofit Organisations

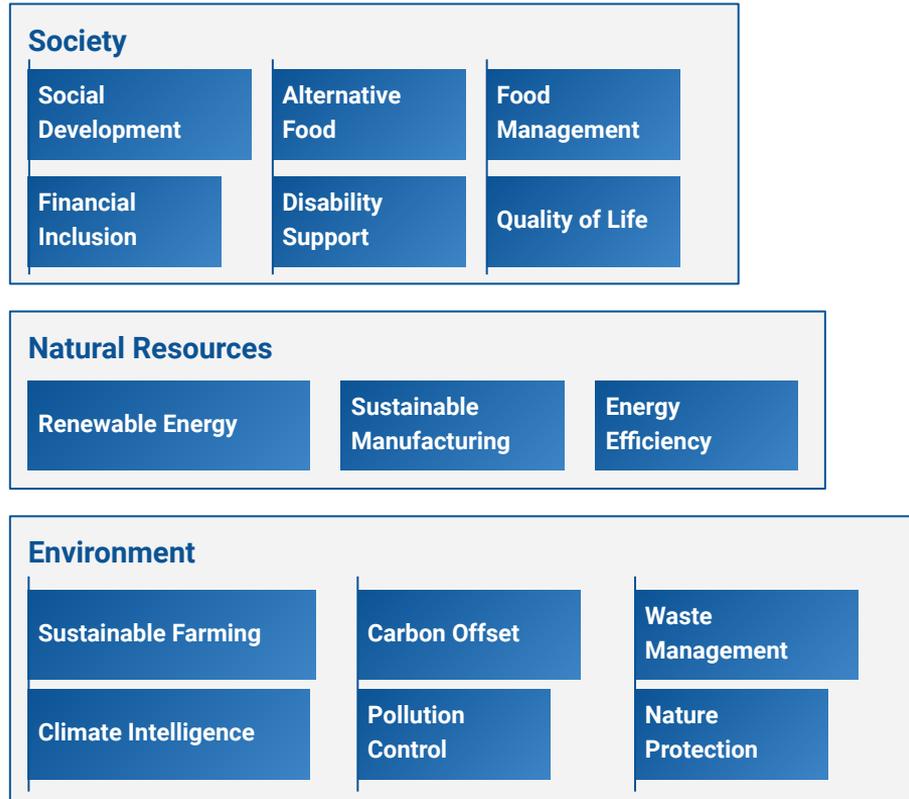


Impact Investment Start-Up Regional Distribution*



Global Impact Investing Market Overview (1/2)

Distribution of Start-Ups by Type of Social Impact

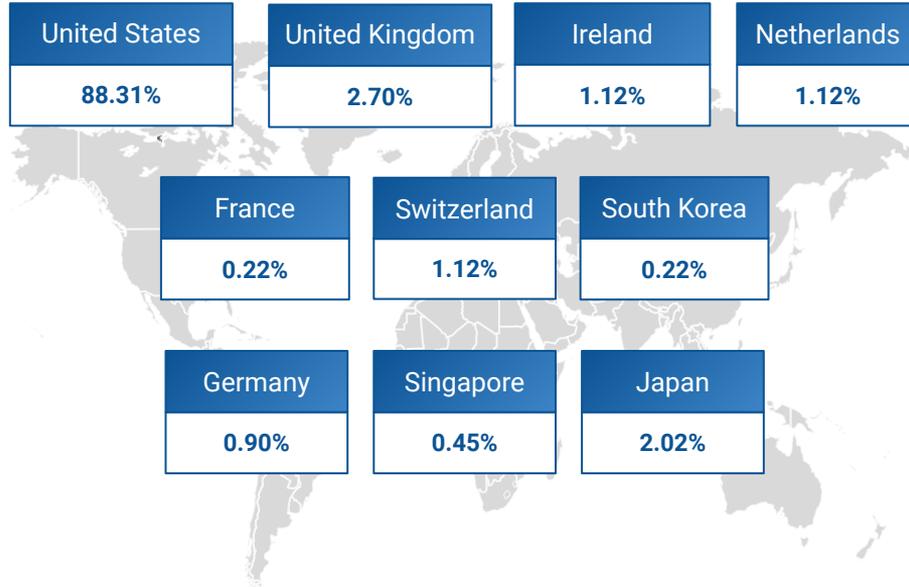


Technologies and Solutions Used in Impact Investing

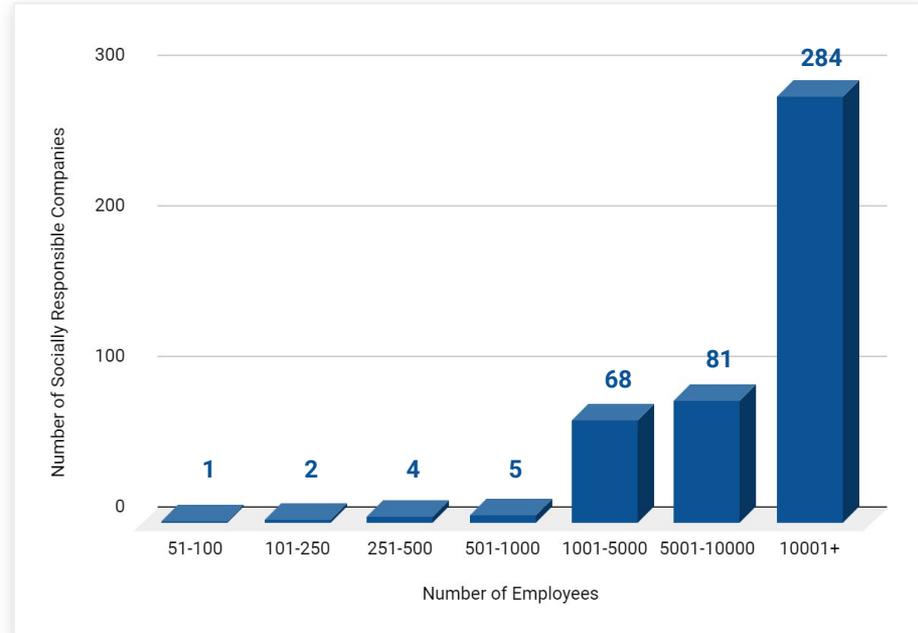


Global Impact Investing Market Overview (2/2)

Regional Distribution by Number of Socially Responsible Companies



Socially Responsible Companies by Number of Employees

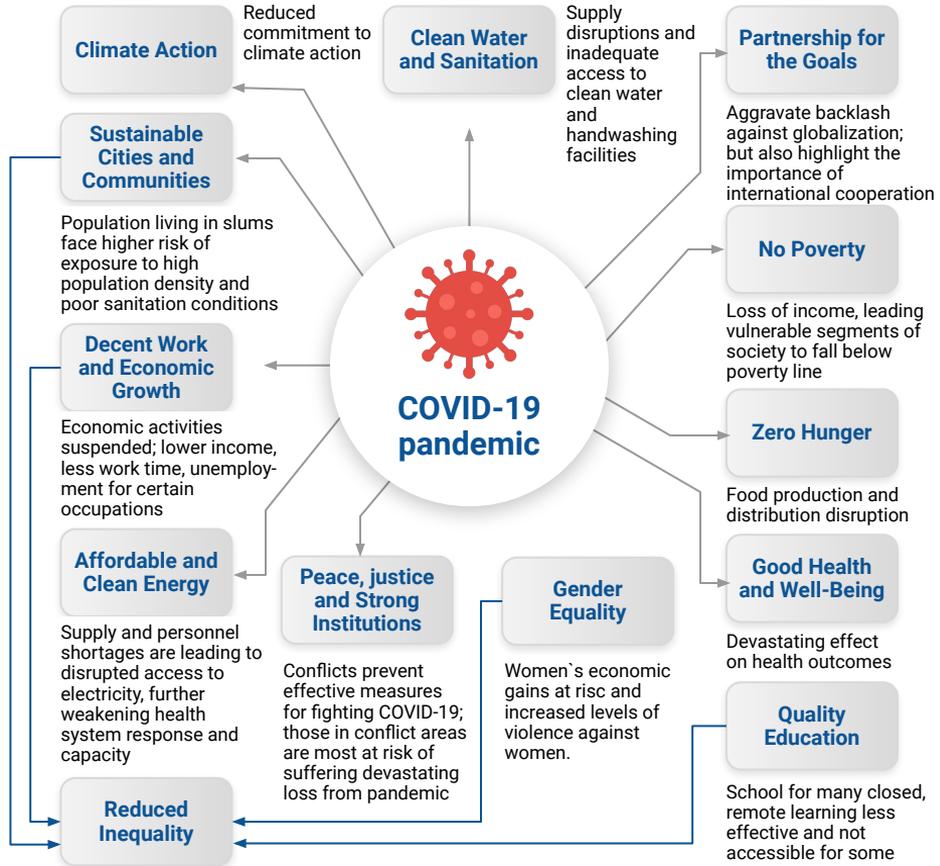
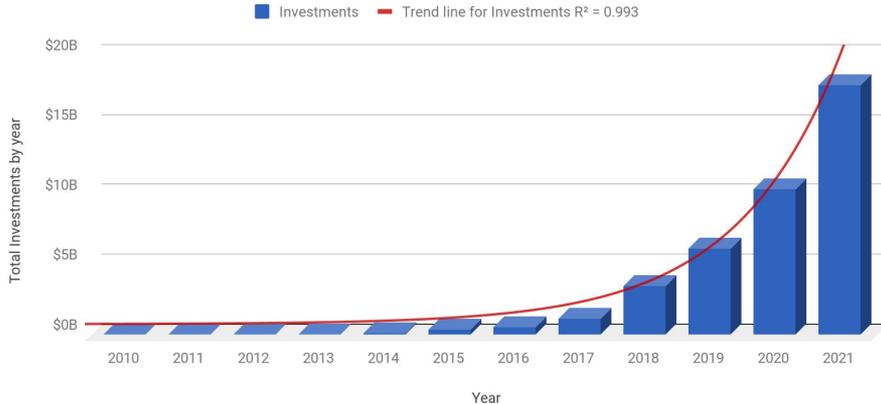


The United States holds the largest number of socially responsible companies that seek to support beneficial social or environmental outcomes in addition to generating financial returns. The United Kingdom follows the United States, accounting for 2.7% of analysed companies. In terms of the number of employees, big corporations are driving social change by taking advantage of their power and reach to communicate their positions on corporate social responsibility to their massive consumer bases as well as to society at large.

Impact of COVID-19 on Investment Flow

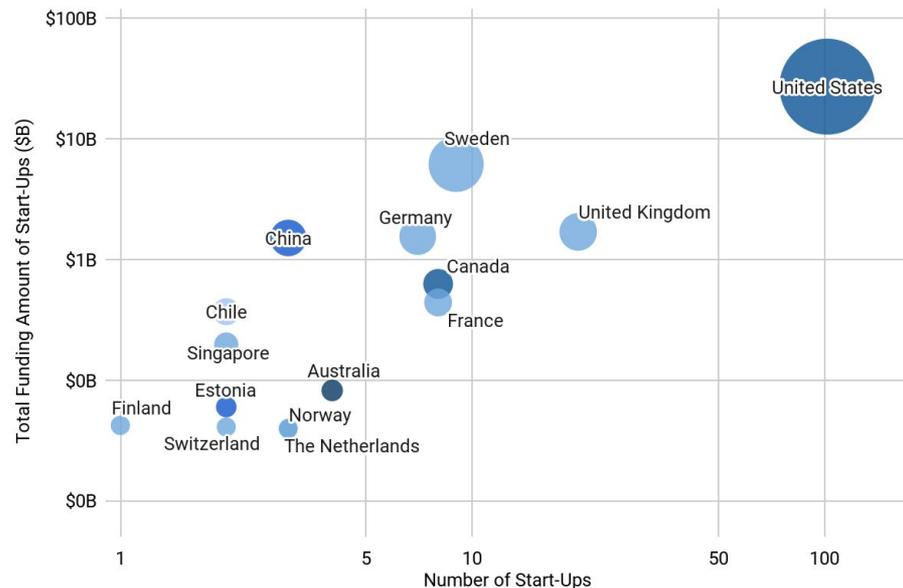
Impact investing has seen a boost in popularity during the COVID-19 pandemic due to increased awareness of climate change and social challenges such as unequal access to healthcare and racial and gender inequality. In 2021, its market size was \$299.9 billion, and it is projected to reach a size of \$793.5 billion by 2027, growing at a CAGR of 17.6% over the period of 2021-2027.

Annual Investment Flow Growth

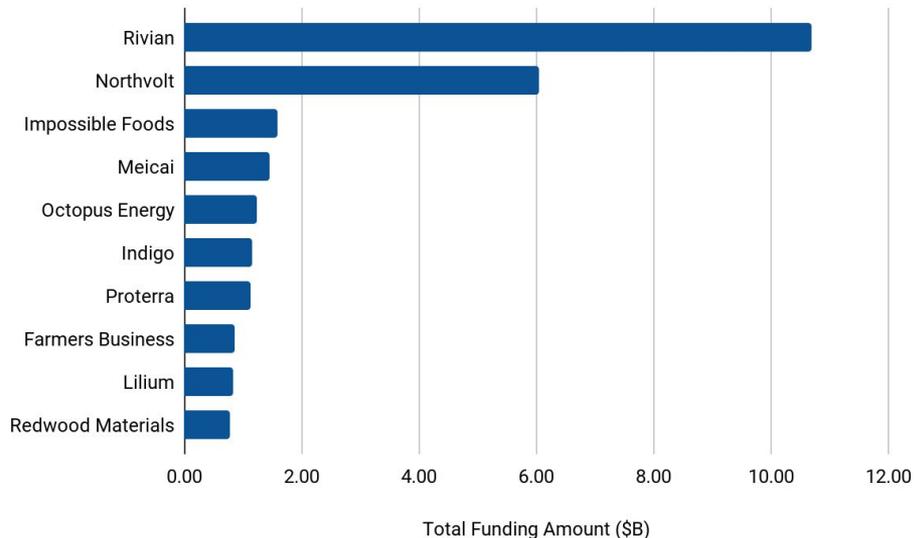


Impact Start-Ups by Volume of Funding

Country Comparison Matrix



Top 10 Impact Start-Ups by Total Funding



The United States is a clear leader in both the number of social impact start-ups (102) and in the volume of funding received (\$27 billion). As shown by the graph on the right, the most heavily funded companies are Rivian (\$10.70 billion) and Northvolt (\$6.04 billion) while the average amount of funding among those companies that received it is \$0.25 billion.

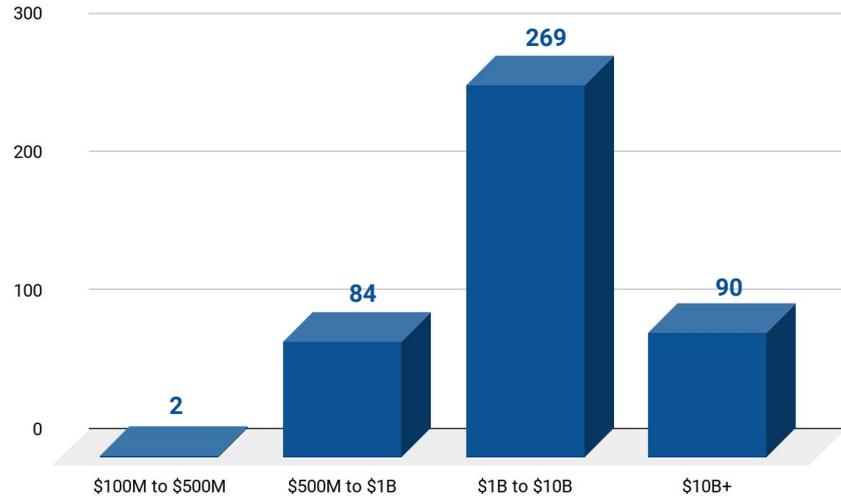
Leading Impact Investment Start-ups by Funding

1	Rivian	\$10.7B
2	Northvolt	\$6B
3	Impossible Foods	\$1.6B
4	Meicai	\$1.5B
5	Impossible Foods	\$2.1B
6	Octopus Energy	\$1.2B
7	Indigo	\$1.2B
8	Proterra	\$1.1B
9	Farmers Business Network	\$870M
10	Lilium	\$826M

11	Redwood Materials	\$792M
12	Perfect Day	\$712M
13	Enpal	\$709M
14	Apeel Sciences	\$640M
15	Pivot Bio	\$617M
16	Volta Charging	\$575M
17	Plenty	\$541M
18	Beta Technologies	\$511M
19	Nature's Fynd	\$508M
20	Bowery Farming	\$488M

Socially Responsible Companies by Age, Revenue, Type

Number of Companies by Revenue

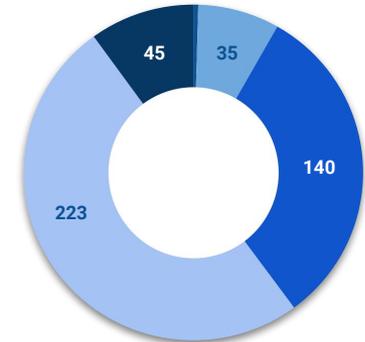


The majority of socially responsible companies (60%) earn between \$1 billion and \$10 billion. There are roughly the same number of companies with revenues in the range from \$500 million to \$1 billion (19%) and over \$10 billion (20%). Half of the companies are between 50 and 150 years old, and a third of the companies were founded between 20 and 50 years ago. More than 90% of the companies are public while only 8% are private equity.

Share of Companies by Age and IPO Status

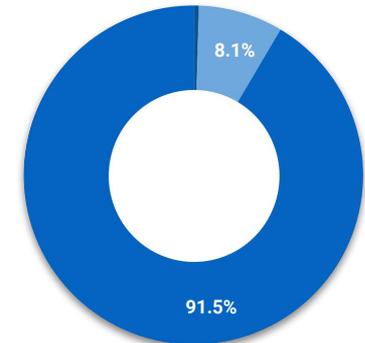
By Age:

- Less than 5 years
- From 5 to 20 years
- From 20 to 50 years
- From 50 to 150 years
- More than 150 years



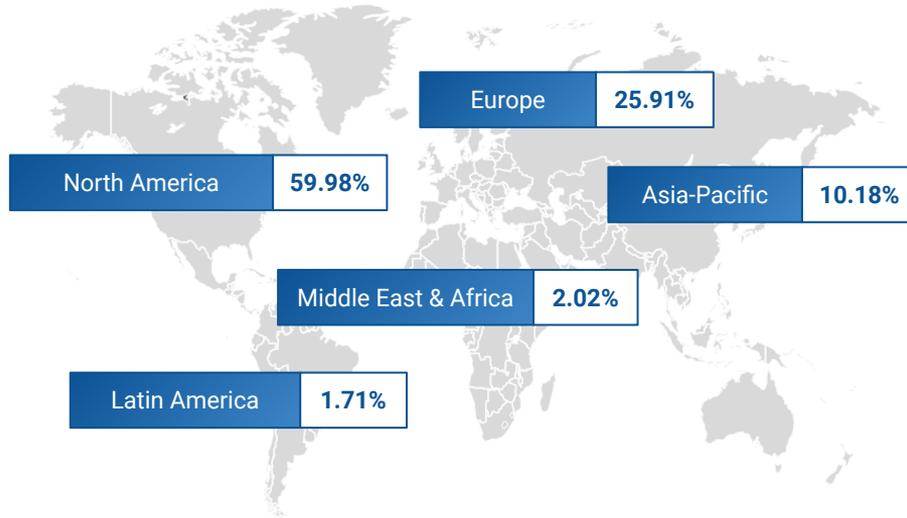
By IPO Status:

- Delisted
- Private
- Public

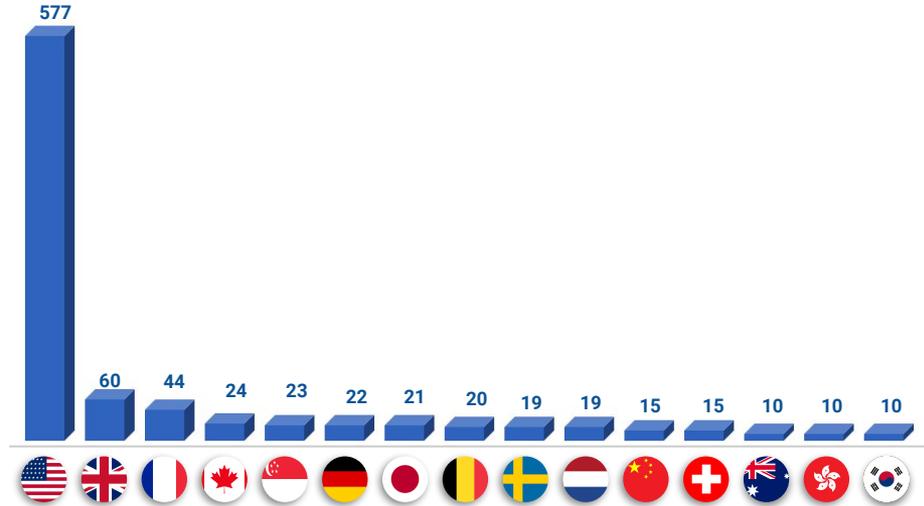


Regional Distribution of Investors

Proportion of Investors in Each Region



Top 15 Countries by Number of Investors



Almost 60% of investors are located in North America. The second biggest region is Europe, with more than a 25% share of the global number of investors. The Top 3 countries by the number of investors are the United States (39.5%), the United Kingdom (9.9%), and France (6.2%).

Top 25 Nonprofit Organisations

United States



Bill & Melinda Gates Foundation
New York, United States



AbbVie Patient Assistance Foundation
Chicago, United States



American Red Cross
Washington, D.C., United States



Catholic Relief Services
Baltimore, United States



Chan Zuckerberg Foundation
Palo Alto, United States



Direct Relief
Santa Barbara, United States



Nature Conservancy
Arlington, United States



Feeding America
Chicago, United States



Open Society Foundations
New York, United States



World Wildlife Fund
Washington, D.C., United States



Save the Children Federation
New York, United States

Switzerland



Gavi the Vaccine Alliance
Geneva, Switzerland



International Committee of the Red Cross
Geneva, Switzerland



The Global Fund
Geneva, Switzerland



Swiss National Science Foundation
Zürich, Switzerland



Germany



Founderland
Berlin, Germany



Spain



Tree-Nation
Barcelona, Spain



Canada



Queen's University at Kingston
Kingston, Canada

United Kingdom



Breast Cancer Now
London, United Kingdom



Crisis
London, United Kingdom



The Big Give
London, United Kingdom



The Woodland Trust
Grantham, United Kingdom



United Bible Societies
Swindon, United Kingdom



Wildlife Aid
Leatherhead, United Kingdom

Sweden



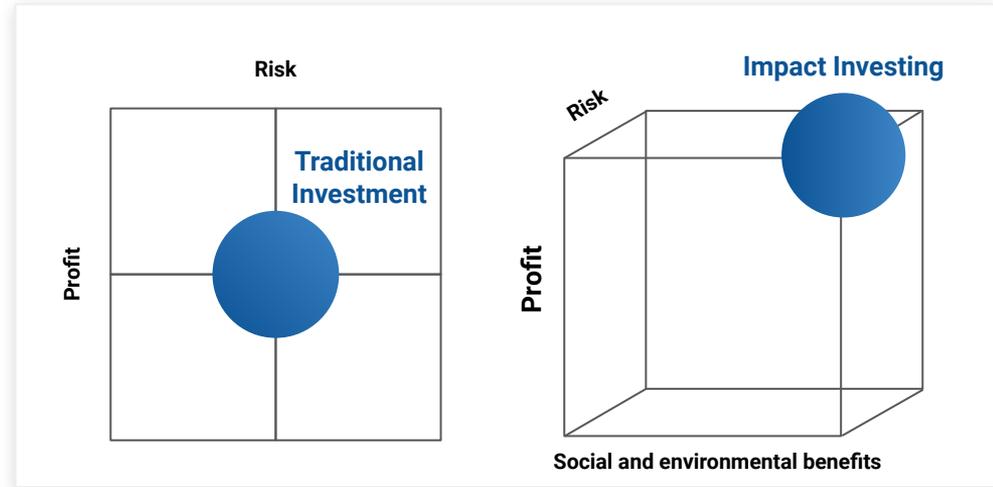
Norrskan Foundation
Stockholm, Sweden



Impact Investing Industry

For many years, there has been a conviction that the ideal of delivering a financial return while doing good is hard to reach, and, therefore, philanthropy cannot be integrated with investing. The growing danger of the inevitability of global problems at the same time as the growing awareness of corporations of responsibility for both financial and nonfinancial indicators has formed the direction of investment of social impact.

Investors are now increasingly moving towards an investment criteria model that adds social and environmental impacts to traditional risk and return parameters.



Market Forces

Deliberate Impact

	Traditional Investment	Impact Investing	Traditional Philanthropy
Approach:	Investing into well-known and most promising assets	Sustainable influence Focus on social benefit	Selfless devotion to improving recipients' well-being
Intention:	Striving to generate financial returns	Investigating solutions with the highest social impact	The fastest and most targeted social impact that does not imply a return of the costs incurred

Impact Investment Elements

Investing in sustainable development is a well-established response to environmental challenges. This includes identifying opportunities for return in those companies that create solutions to sustainability challenges. This allocation of investments can be made across different asset classes. Impact investing has similarities to sustainability investing, with ESG integration and active ownership underlying the implementation of both.

However, while both strategies share some commonalities, impact investing goes further and includes additional considerations that may have more significant results than other investment strategies. Investing in sustainable development is a well-established response to environmental challenges. This includes identifying opportunities for return in those companies that create solutions to sustainability challenges.

Key Elements of Impact Investment

Intentionality

Intentionally contributes to positive social or environmental outcomes.

Measurability

Intended social or environmental impacts need to be accurately and reliably measured and reported.

Additionality

Provides social and environmental benefits that would not otherwise be available without investment.

Sustainable and Impact Investing Themes and Viewpoints in 2022

Climate Change

Climate Change

- Industries that produce heavy carbon emissions may face issues such as orphan assets, carbon pricing, and divestment of investments.
- More and more sophisticated conservation strategies are emerging, with a focus on innovation across all asset classes.

The Future of Work

The Future of Work

- Companies must provide their workers with strong social security and DEI¹ programmes as well as increasing evidence of financial materiality.
- More data allows investors to lean towards companies offering a living wage, access to healthcare, and effective DEI programmes and policies.

Collision of ESG Interests

Collision of ESG Interests

- Issuing 'sustainability standards' promotes transparency and prevents greenwashing.
- Re-evaluating how ERISA² accounts participate in the ESG is driving wider adoption by pension fund members.

Deepening data channels on climate change and the future of work can enable the creation of new thematic investment strategies, providing improved tools for investors who seek to drive climate innovation and more sustainable, innovative, and inclusive companies. Meanwhile, new regulatory guidance on sustainable and efficient investing standards could help undermine investor perceptions of green laundering and fiduciary inadequacy, leading to wider adoption of ESG.

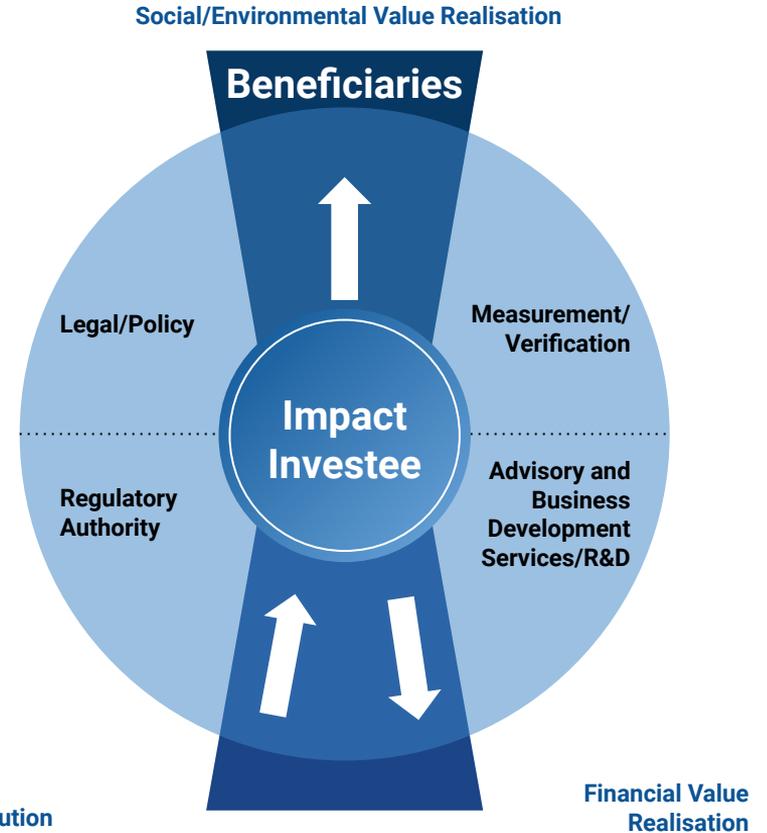
Current Challenges With Impact Investing

Despite the progress made thus far in impact investing, it is yet to maximise its full potential as a development financing instrument. Currently, most impact investing comes from DFIs and major social foundations. The full power of the private capital market is waiting to be harnessed.

Another key challenge is the issue of measuring and quantifying impact. As impact investing ventures vary, so do their measurement techniques, making it difficult to attain universal standardisation. Lack of standardised metrics makes it harder to quantify and compare nonfinancial impact, thereby reducing consistency across sectors.

The lack of an efficient impact investing 'ecosystem' results in significant time and resources being consumed before investors can successfully venture into the market.

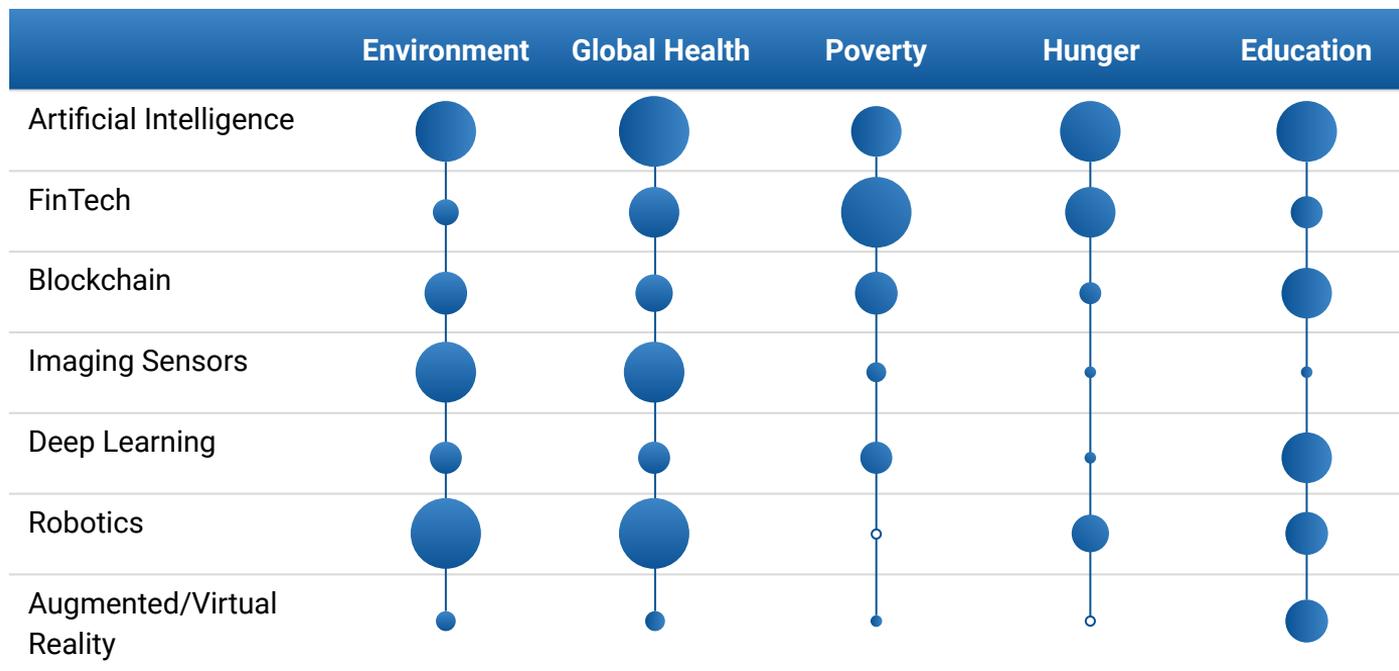
Finally, because the impact investing market is still in its intermediary stages, there is a lack of widespread awareness on investing options. According to a recent study by *the Financial Times*, the biggest concern for investors is finding suitable impact investing opportunities and obtaining tailored mentorship for the process.



DeepTech as an Innovative Driver in the Social Sector

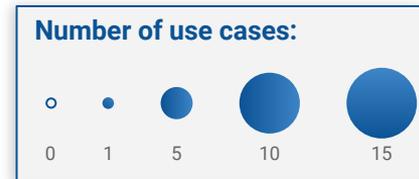
DeepTech's 'profound enabling power' has the potential to bring about real change. It harnesses cutting-edge technologies to create tangible societal shifts, and never has it been more relevant. The COVID-19 pandemic, the urgency of the climate crisis, and the rapid expansion of global populations have placed added strain on already fragile systems, and it is these fundamental issues that DeepTech is designed to address.

Frequency of Use of Deep Technologies to Solve Global Problems

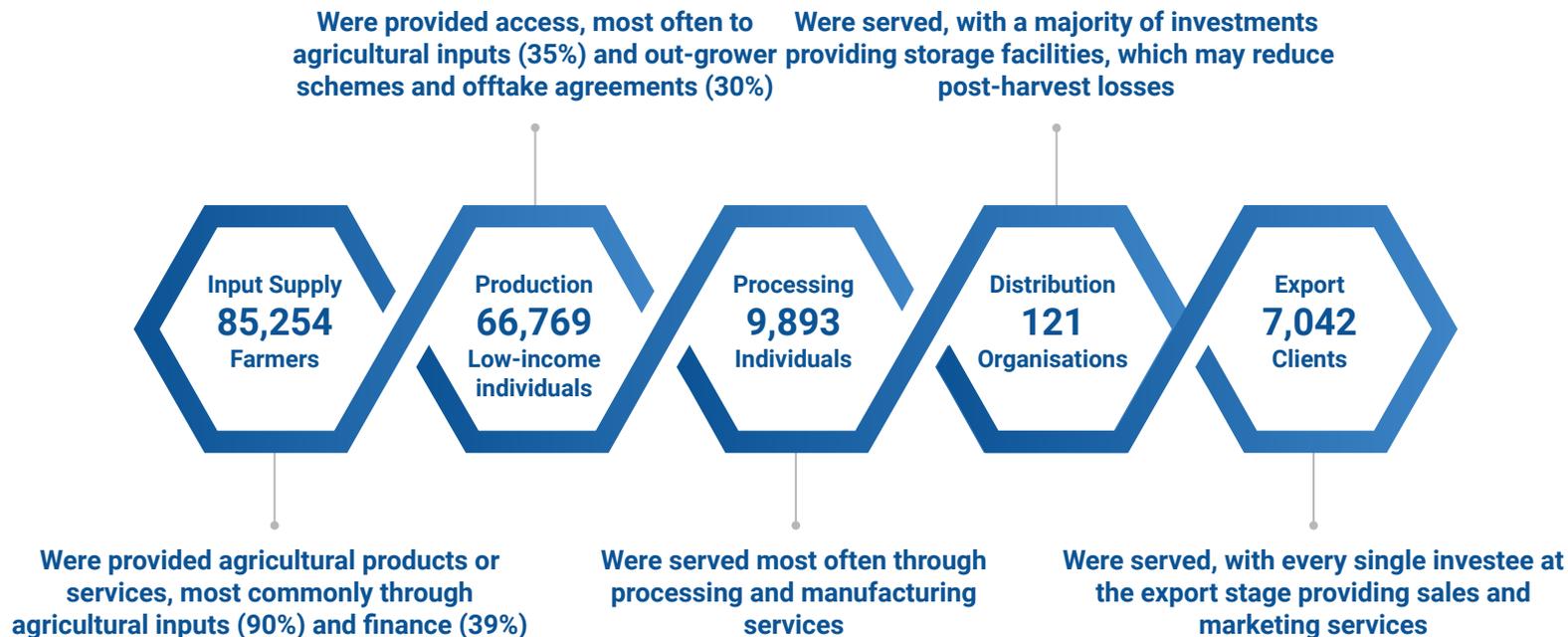


This chart is constructed from a database of 220 use cases of advanced technologies aimed at solving global societal and environmental issues.

Frequency of use is an estimate of the number of applications of a given technology to one of the major global challenges. The estimation is approximate and should not be considered definitive.



Impact Investment on Sustainable Farming



GIIN's *Understanding Impact Performance* study shows a tremendous impact on average of one single investment (out of 661 annualised investments). One average investment could supply 85,254 farmers with agricultural inputs such as seeds, fertiliser, and machinery needed for production and at the end of value chain deliver products to 7,042 clients in other countries.

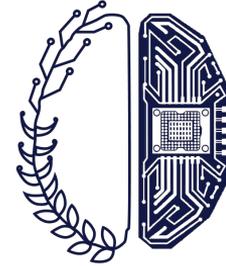
African Charities Analytical Dashboard

This unified platform aims to map, categorise, and rank market participants of their respective sectors by filtering them through geographical maps and mindmaps with visualised analytics of associated global challenges. The platform also features profiles of organisations, donors/investors, and tools for matchmaking impact start-ups with investors and charity organisations – donors and charities – with impact start-ups as well as with financial institutions, volunteers, and other partners.



About Deep Knowledge Philanthropy

Deep Knowledge Philanthropy is a data-driven nonprofit project by Deep Knowledge Group committed to the support, development, and advancement of DeepTech for the social good. It was founded on the belief that DeepTech innovation is the most efficient driver of 'social profit', technological humanitarianism, and societal development and that venture philanthropy is the profitable long-term investment for individuals, national economies, and humanity itself.



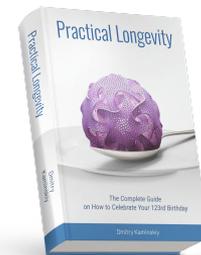
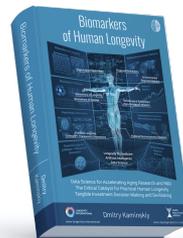
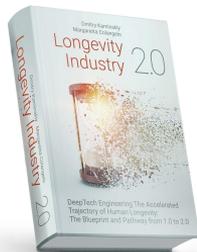
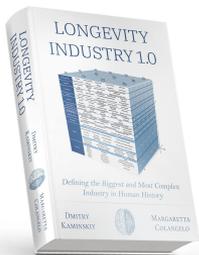
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Deep Knowledge Philanthropy employs the most sophisticated approaches to analytics used by its founder, who is also the Deep Knowledge Group leader of proprietary analytical research in the Longevity and advanced science fields. We aim to use pioneering scientific discoveries to efficiently prolong human lifespan and bring socially-inclusive humanitarian benefit by supporting innovations, science, charitable, and sponsorship projects.

The organisation was founded in 2021 to house the sum of philanthropic, nonprofit, and influence investment activities, projects, and initiatives conducted over the past 5 years under the Deep Knowledge Group umbrella. Its activities are backed by the quantitative analytics produced by Deep Knowledge Group's 10+ analytical subsidiaries, implementing the most advanced approaches to analytics, benchmarking, predictive forecasting, and data-driven strategy formulation and execution in order to deliver 10x-50x the social impact and ethical ROI per dollar than the nonprofit and philanthropy sector average.

Deep Knowledge Group's analytical and nonprofit activities are powerful tools for extremely efficient and productive engagement with governments, progressive top-tier corporations, industry influencers, journalists, and a wide range of other strategically relevant personalities and organisations. All Deep Knowledge Group's activities (both for-profit and nonprofit) are structured in order to support, develop, and leverage the power of DeepTech for socially-inclusive humanitarian benefit, based on the foundational principle that technological innovation is the key driver and most efficient tool for improving quality of life, safety, stability, and growth potential for global society and the belief that the highest return on investment is not just profit but ethical returns and the delivery of added quality of life and developmental opportunities for humanity.

Deep Knowledge Group: Books

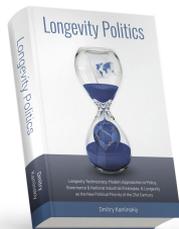


Longevity Industry 1.0
2010-2020: Evolution of the Longevity Industry from Zero to 1.0

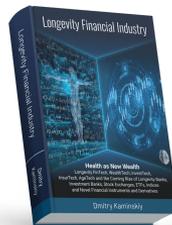
Longevity Industry 2.0
2020-2025: DeepTech Engineering
The Accelerated Trajectory of Human Longevity – The Blueprint and Pathway from 1.0 to 2.0

Biomarkers of Human Longevity
The Critical Catalyst for Practical Human Longevity, Tangible Investment De-Risking, and Accelerated Ageing Research and Longevity R&D

Practical Longevity
Practical, Market-Ready Tools, Approaches and Frameworks for Optimizing Personal, Practical, Healthy Human Longevity



Longevity Politics
2021-2030: The Rise of Longevity Politics, and the Solidification of Longevity as the New Political Priority of the 21st Century

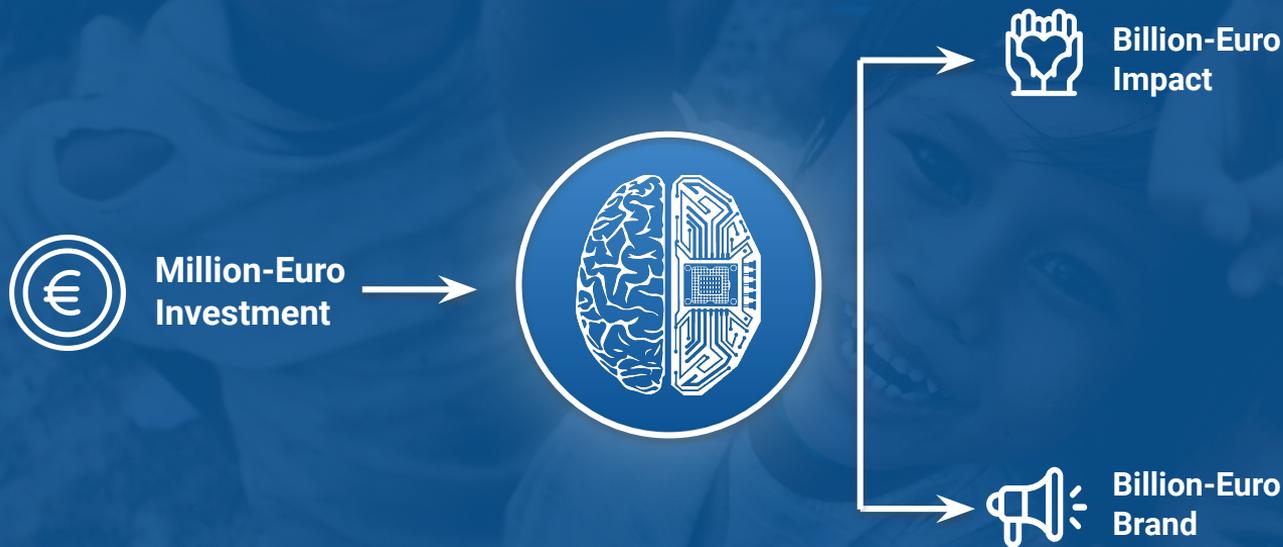


Longevity Financial Industry
Health as New Wealth, Engineered Solutions to Bridge the Longevity Liquidity Gap, and the Rise of Longevity Investment Banks, Stock Exchanges and Financial Instruments



The 5th Industrial Revolution
2030-2035: Defining, Forecasting, Optimizing and De-Risking the Accelerated Trajectory of Progress Toward the 5th Industrial Revolution

Our proposal is **more than a charity offer** – it is an **investment opportunity**.

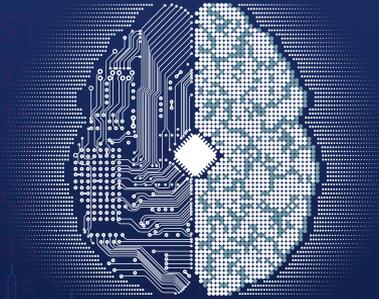


Join us and your million-euro contribution will result in a billion-euro return in **global social impact** and **international personal brand** development.

Venture Philanthropy Is the Most Profitable Long-Term Investment.



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Link to the Report: www.deep-knowledge.org/global-impact-investing-q2-2022

E-mail: info@deep-knowledge.org

Website: www.deep-knowledge.org

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